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PIN-Ops User Guide

Introducing PIN-Ops

Overview of PIN-Ops Features

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Introduction

This section provides an overview of the system's features that were designed for efficiency of data entry and maintenance.

Title Bar

The Title Bar is located at the top of the screen below the Menu Bar. It shows the screen name as a point of reference while working through PIN-Ops. The Title Bar is highlighted when the screen is active.

Refer to [Figure 1-4-1](#).

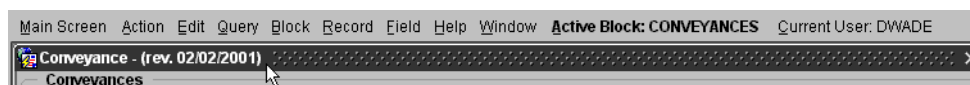


FIGURE 1-4-1: Title Bar

Status Bar

The Status Bar is located at the bottom of each screen. It provides hints to users about the purpose of the data field where the cursor sits and the commands or functions to use.

Refer to [Figure 1-4-2](#).



FIGURE 1-4-2: Status Bar

Along the Status Bar is a counter of the records being accessed, i.e., Record 1/1. This counter is a good reference to know the total records in a set returned on a query or to know the number of records entered and saved during a working session.

EXAMPLE: When there are 21 records in the set: counter shows 1/?, then 2/?, until the user navigates (down arrow key) to the last record when the counter shows 21/21.

Menu Bar

Most all of the screens in PIN-Ops have a Menu Bar along the top of the screen directly above the Title Bar.

Refer to **Figure 1-4-3** followed by a description of the active functions under each title on the Menu Bar.

HINT: The active functions of the Menu Bar only apply to the block on the screen where the cursor sits: *the active block*. This is important to understand when saving records, clearing records, and using function keystrokes. See also **What is a Block?**

HINT: Open a drop-down menu by, pressing Alt + the underlined letter of the menu, then type the underlined letter of the function, or use the mouse or arrow keys to navigate.

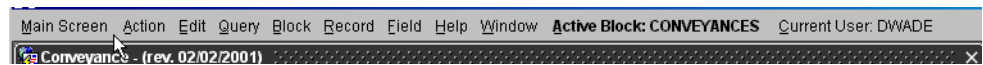


FIGURE 1-4-3: Menu Bar

Main Screen

Return to the Main Menu screen.

Action

Refer to **Figure 1-4-4** for the actions available under Action.

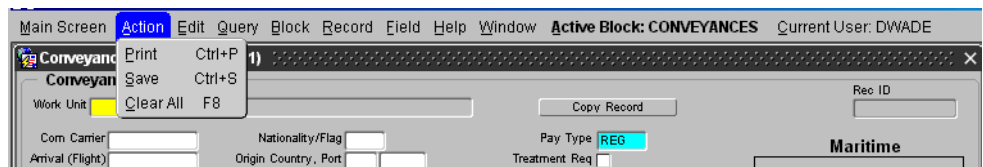


FIGURE 1-4-4: Action Menu

Print (Ctrl+P)

Prints the current screen.

Save (Ctrl+S)

Saves the information entered on the current record as well as saves other records that were created but not saved.

Clear All (F8)

Clears out information entered into data fields on the current screen before saving to the database, as well as clears data from other pending records not yet saved. Works best when only part of the record has been filled; use Record Clear (F6) when a record has been completely or nearly filled. See also, Clear under **Block**, **Record**, and **Field**.

Edit

Changes to a current field.

Refer to **Figure 1-4-5** for the actions available under Edit.

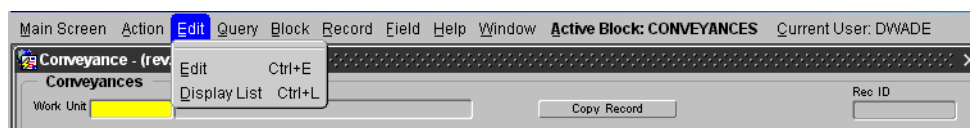


FIGURE 1-4-5: Edit Menu

Edit (Ctrl+E)

Brings up an Editor window to change and view the content of a data field, rather than typing over an entry.

Refer to **Figure 1-4-6**.



FIGURE 1-4-6: Editor Window

Display List (Ctrl+L)

Displays the list (or table) of values when in a data field that is a lookup.

Query

Searches through the entire database. Use Query mode to retrieve a specific record or a few records from the database.

Refer to **Figure 1-4-7** for the actions available under Query.

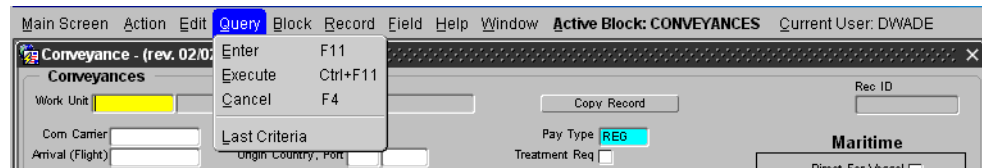


FIGURE 1-4-7: Query Menu

Enter (F11)

Clears out all information from the data fields on the current screen changing it to a enter-query mode. The screen is ready for the user to enter information into one or more data fields (query criteria) for a more selective search.

Execute (Ctrl+F11)

Initiates a search of data. PIN-Ops will bring up records that match the data fields entered for a more selective search. If no information is entered in data fields to narrow the scope of the query, then PIN-Ops will return all records.

The first record will be displayed on the screen and the Status bar (at the bottom of the screen) will show the number of records as they are displayed (i.e., 1/?). Press F12 to show total number of records found.

Cancel (F4)

Exits enter-query mode, if active.



Never hit F4 twice—it may cause you to exit PIN-Ops.
Hit F6 to clear a record.

Last Criteria

After executing a query, a user can enter-query mode again and select last criteria to fill in the most recently entered query criteria.

This action: saves data entry because a user now only adds or changes criteria, and is an effective technique for narrowing the record set (number of records) returned on a query.

Block

Function happens to the active block of the screen. A single screen can contain more than one block. See also [Active Block](#).

Refer to [Figure 1-4-8](#) for the action available under Block.



FIGURE 1-4-8: Block Menu

Clear (F7) Only clears out information in the current block. See also, Clear under **Record** and **Field**.

Record
Functions happen to the current record. A single screen can contain more than one record.

Refer to **Figure 1-4-9** for the actions available under Record.

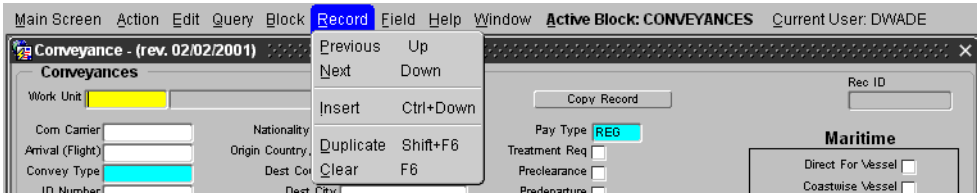


FIGURE 1-4-9: Record Menu

Previous (Up) Navigate or jump to the last record.

Next (Down) Navigate or jump to the next record.

Insert (Ctrl+Down) Places the screen in an insert mode, adding a new record.

Duplicate (Shift+F6) After the screen is in insert mode, select duplicate to copy the last record into the new record. Data fields can be modified and then saved as the new record which saves time entering data. Same as a Copy Record button found on a few screens.

Clear (F6) Clears out information entered only on the current record.

If:	Then F6:
Inserting a new record	Clears all fields of current record
Looking at a record of a set from a query	Clears the record from the set. Re-query will bring it back.

Field
Allows actions to current data fields.

Refer to [Figure 1-4-10](#) for the actions available under Field.

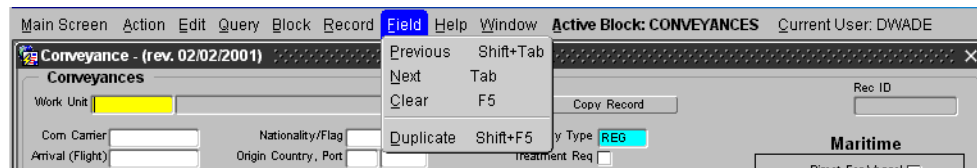


FIGURE 1-4-10: Field Menu

**Previous
(Shift+Tab)**

Navigate or jump to previous data field.

Next (Tab)

Navigate or jump to next data field.

Clear (F5)

Clears out information in the current data field (where the cursor sits).

**Duplicate (Shift
+F5)**

Copy current data field from the same field of the previous record.

Help

Aid using PIN-Ops.

Refer to [Figure 1-4-11](#) for the actions available under Help.

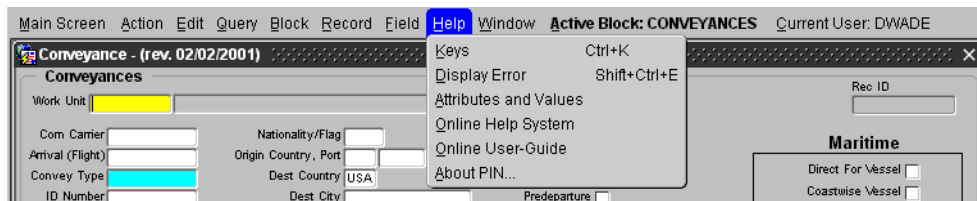


FIGURE 1-4-11: Help Menu

Keys (Ctrl+K)

Displays shortcut keys. See also [Common Shortcut Keys](#).

**Display Error
Shift+Ctrl+E**

More detail on current error message.

Note error and go to Appendix B, [Error Messages](#) for possible correction.

**Attributes and
Values**

More details on underlying attributes and values of the current field. Useful for creating reports and narrowing the scope of a query.

**Online Help
System**

Click here to go to the online help system.

Online User Guide Click here to go to the web-based version of the user guide.

About PIN-Ops Displays version number and contacts for the database.

Window

Refer to **Figure 1-4-12** for the available options for the open windows (screens).

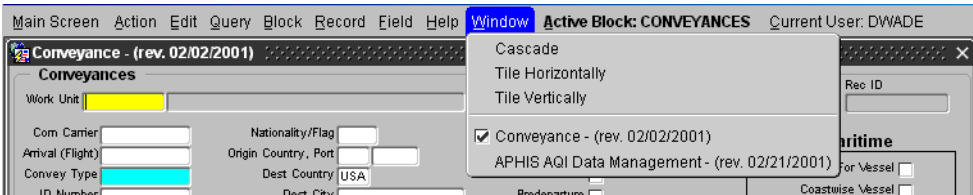


FIGURE 1-4-12: Window Menu

Listed in the bottom half of the drop down menu are all the open windows (or screens). The active window is checked for easy reference; all other open windows are listed for selection. Selecting an open window from the Menu Bar is another way of moving among windows (or screens).

Active Block

Along the Menu Bar between Window and Current User, there is the title: Active Block. Refer to **Figure 1-4-13**. Here a user can identify in which block the cursor sits, or more importantly, know when the cursor moves from block to block.



FIGURE 1-4-13: Active Block Indicator

The screens in PIN-Ops are set up using blocks of data fields that usually have a common grouping, which facilitate data entry, data maintenance, and data retrieval. The blocks on the screens are then connected to the tables of the database, i.e. the cargo block connects to the cargo table.



Important

It is important to know in which block the cursor sits on the screen (the active block) because the actions on the Menu Bar affect the active block.

Current User

Displays name of current user.

Refer to [Figure 1-4-14](#).

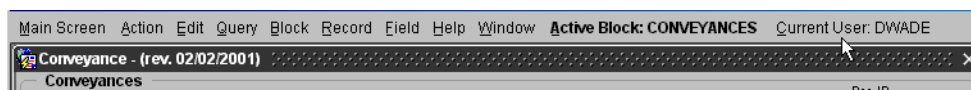


FIGURE 1-4-14: Current User Indicator

Fields

Recording information on screens is selective and progressive. Because users may be entering data for a specific pathway or may only have some data upon being notified of an arrival, they most likely will not complete every data field during a given working session. Therefore, a variety of data fields were designed to allow for the diversity of entering and maintaining data.

Order of Data Fields

The data fields on most of the screens in PIN-Ops were designed to follow a specific order. Usually, the most important data fields come first, then the more commonly used fields, followed by the least used fields.

When initially creating a record, only fill in the mandatory fields in order to save it to the database. Update that record when all the necessary information is gathered.

All numeric fields are right justified; all text fields are left justified.

Yellow Data Fields

The active field where the cursor sits. It is currently active for filling in data. Does not work in enter-query mode.

Blue Data Fields

These fields must be filled before saving a record. If a mandatory field is not applicable (such as, to the pathway), then type a '*' in the field.

HINT: Other fields may be designated as mandatory for local operational purposes. Take note of those additional mandatory fields.

White Data Fields

These fields are not required to save a record but are often needed for reporting and analysis. See also **Non-applicable Data Fields**.

Gray Data Fields

Only for displaying information. Information cannot be typed in gray data fields but most can be queried.

Check Boxes

Check the box for Yes by clicking in the box; leave the box blank for No. Some check boxes default to Yes or No, while some default to null forcing the data field to be filled.

The data field, **Activated**, is a check box. It will always be checked, which means it defaults to Yes. This checked box means the record is active and would be included in compiling reports. A user can click on the check box to remove the check. A blank box means the record is inactive and would not be included in reports.

All records created in PIN-Ops remain there and cannot be deleted locally. But, a record can be inactivated by clicking on the box to remove the check. The record remains in the database, and would not be included in data gathered for reports. Inactivated records can only be removed by the National Administrator.

Non-applicable Data Fields

Not all fields on a record apply to a specific importation. Some fields are specific to a pathway, i.e., air cargo or maritime cargo; or specific to a land border conveyance, an aircraft, or a vessel.

Therefore, notice that the sections in this user guide covering data entry are structured by pathways with only their applicable data fields.

Lookups

These fields have been set up as tables of values from which to select. Some tables have been created at the national level; others can be created at local levels.

The rapid lookup method is to type only the first few letters and then press Enter. PIN-Ops automatically fills and exits these data fields if the letters uniquely match an item in the table of values. PIN-Ops will not accept data other than what is listed.

EXAMPLE: In the data field 'Packing Type' only type 'C' because there is only one value in the lookup list that begins with C. PIN-Ops automatically enters Cardboard and the cursor moves to the next field. If there is not a unique match to the typed letter, the table of values automatically displays.

Open a table of values by pressing Ctrl+L or selecting Edit>Display List. Then, scroll up and down the list.

HINT: To narrow the scope of scrolling, type only the first few letters before the '%' and press Find. If there is a match, PIN-Ops automatically fills in the data field and the cursor moves to the next field. If there is not a unique match to the typed letter, the table of values automatically displays.

List of Lookups

The values of lookups are shown in this user guide when they are frequently used, the values do not change, or they are short. For long tables, the user guide will only show the most commonly used values.

HINT: All the short lookups (5-30 items) are available on the Seagate Info Desktop under PIN-Ops List of Values Codes Report. The report can be downloaded and printed.

How to Add or Change Lookups

To add or change values on a lookup maintained nationally, contact a local or regional coordinator who will in turn work with the PPQ Program Manager, the AQI Information Steering Team, and the Program and Data Management Analysis staff to update the list.

See Appendix A, **Key Contacts**.

Dates

Most data fields that are dates are automatically filled with the current date. A user would only change a date if information was being recorded for another day.

Text Data Fields

Name fields and other free-form fields allowing for various numbers of characters (alpha and numeric) and spaces.

HINT: For text data fields, use the Editor Window (Ctrl+E) to change the content of a data field, rather than typing over an entry.

Unique Data Fields

Fields that as a group are unique for a type of record to prevent duplicating records in the database. For example, on the Conveyance screen the unique fields are Work Unit, ETA Date and Time, and License Number.

What is a Record?

A record is synonymous to a piece of paper with information gathered about a specific conveyance, cargo, monitoring sample, or safeguard item that has been reviewed, cleared, or regulated by PPQ.

Once data is filled into data fields on a screen and saved, it is a record. That gathered information is identified with a record number for tracking purposes. All record numbers (Rec ID) are unique and can be queried.

To avoid duplicating records, there must always be a unique combination of the work unit, waybill (or bill of lading) number, house waybill number (if applicable), and arrival date for each record. See [Unique Data Fields](#).

Rec ID

A unique number assigned incrementally by PIN-Ops to the records being created nationally. Therefore, note that the record numbers for a main work unit will be in order but not necessarily consecutive.

What is a Block?

The screens in PIN-Ops are laid out in blocks of data fields that usually have a common grouping, which facilitate data entry, data maintenance, and data retrieval. The blocks on the screens are then connected to the tables of the database, i.e. the cargo block connects to the cargo table.

EXAMPLE: Consider filling in data much like preparing an invoice. The top part of an invoice has general information about the company as well as about the purchaser that are the main reference data for billing, tracking back orders, and taking future orders. The top block of the Cargo screen has general information about the cargo with a unique record ID that become the main reference data for recording results, tracking held items, and streamlining recording and reporting in the future. The bottom part of an invoice has the details of the items purchased and are linked to the general information at the top of the

invoice through an invoice number. The bottom blocks of the Cargo screen are tabs on which to record the details of the cargo that are linked back to the top block of the Cargo screen.

It is important to know in which block the cursor sits on the screen (the active block) because the actions on the Menu Bar affect the active block. The active block is displayed along the Menu Bar. Refer to [Figure 1-4-13](#). Here a user can identify in which block the cursor sits, or more importantly, know when the cursor moves from block to block.

HINT: When using the arrow keys, shortcut keys, or active functions from the Menu Bar, the action affects the active record or block. **Note the Active Block on the Menu Bar.**

What are Tabs?

Tabs contain separate information from the main part (top) of a data entry screen. The tabs are called child records to the main part of a screen that is the parent record.

The information filled in on tabs are separate from that filled in on the main part of the screen. Therefore, when a record is saved while the cursor is on a tab, only the information on the child record is being saved. The cursor must be on the main part of the screen to save the parent record.

Main Menu Screen

From a Main Menu screen, users can access two types of screens in PIN-Ops: set up and data entry. Refer to [Figure 1-4-15](#). These two types of screens were designed differently to accommodate the information being recorded on each type of screen.



The fundamental differences between set up and data entry screens may cause users to think that PIN-Ops is functioning differently to the same actions performed on either screen.

All set up screens (except employee and work unit) focus on one main work unit at a time. That means when filling in data on a set up screen, only the main work unit is typed in the work unit data field. All created reference lists and user-defined fields only need to be identified by the main work unit.

While for data entry screens, when a user clicks in the work unit data field, any work unit can be typed. Also on data entry screens, a user can query any work unit.

Data entry screens were designed to ease its use, to prevent errors, and to reduce key strokes. For example, the cursor automatically moves to the next field after an item has been selected from a lookup (list of values).

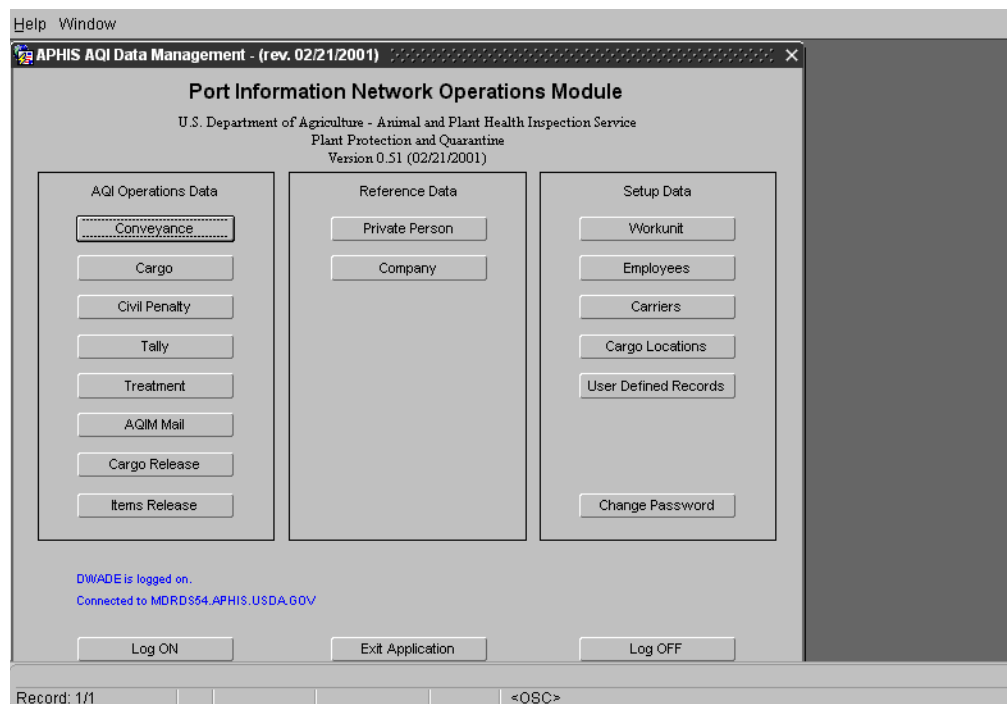


FIGURE 1-4-15: Main Menu Screen

AQI Operations Data

The buttons listed under this column on the Main Menu screen are the most frequently used sections of PIN-Ops for the typical user because they go to the data entry screens. See **Record Screens for AQI Operations Data**. This is where information about daily operations is recorded.

Reference Data

The buttons listed under this column on the Main Menu screen are used to compile nationwide reference lists for PIN-Ops. These lists are updated and accessed by all work locations. The first one includes Private Persons and Companies. See [Record Screens for Reference Data](#).

As part of setting up a work location in PIN-Ops, the most common private persons and companies should be added to these lists. Then, work locations should continue adding private persons and companies to the reference lists to enhance PPQ's capacity to better track importations.

Setup Data

The buttons listed under this column on the Main Menu screen are used to set up the following. See [Record Screens for Setup Data](#).

1. Structure of a work location for data entry and reporting purposes
2. Employees for a main work unit that will use PIN-Ops and their access category
3. List of carriers unique to the main work unit
4. User-defined fields and cargo locations unique to the main work unit
5. Password changes

Log ON, Exit Application, Log OFF

Buttons at the bottom of the Main Menu screen that allow a user to do one of the following:

1. Log back on to PIN-Ops without having to reconnect to the Web page
2. Exit PIN-Ops, while maintaining Internet connection
3. Log off as a user of PIN-Ops, but not exit PIN-Ops

Record Screens for AQI Operations Data

In theory, PIN-Ops can be used to track all AQI operational activities from the initial notice of arrival through to the final disposition of safeguard items. Because the PIN-Ops record screens encompass all facets of AQI operations to accommodate all work locations, the database is versatile and massive. Therefore, data entry must be selective depending on what is being recorded for what purpose.

Following are the data entry screens for recording data about daily operations. Each record screen is further described with instructions for data entry under Chapter 2, Entering Data.

Conveyance Screen

Record information about the conveyance itself, arrival, and inspection information for aircraft, maritime vessels, buses, railroad cars, private vehicles, pedestrians, and passengers approaching U.S. ports of entry that are of agricultural interest.

Cargo Screen

Record data about cargoes arriving at ports of entry that are of agricultural interest. Complete those data fields applicable to the cargo. Linked to the Cargo screen are Safeguard Items screens where information is recorded about all commodities found in cargo.

Civil Penalties Screen

Record data about violators. This screen is linked to the Private Person and Company screens where a nationwide reference list is maintained.

AQI Tallies Screen

Record AQI activities that PPQ keeps track of for work accomplishment purposes, but are not recorded in detail. Record information about such activities as reviewing manifests and meat import certificates; issuing phytosanitary certificates, process plant product certificates, VS Form 16-4's, and solid wood packing export certificates; mail inspections, and user-defined fields established as tallies for local reporting purposes.

Treatment Screen

Record any treatment of a conveyance, container, or safeguard item with a preexisting record in PIN-Ops.

AQIM Mail Screen

Record data about mail designated as AQI monitoring samples.

Cargo Mass Release Screen

Allows users to release several Cargo records at one time, to identify all waybills or bills of lading that have not been released, and to track transiting cargoes that are transferred to a work location by generating a list of Cargo records that have not been **cleared** by the work location.

Item Mass Release Screen

Allows users to release several item records at one time, to release those commodities that require no further action after inspection while keeping on hold those commodities that do, and to identify all safeguard items that have not been released or cleared.

Record Screens for Reference Data

Within PIN-Ops there are reference lists available to all work locations. These lists are maintained nationally, unlike the user-defined fields that only main work units can access. Not only can all work locations access these reference lists, but any work location can add to a nationwide reference list. The first nationwide reference list compiled for PIN-Ops are maintained by filling in individual and company records. The following record screens are further described with instructions for data entry under Chapter 4.

Private Person Screen

Record applicable information about private persons the work location commonly provides service to. The data is added to the nationwide list updated at work locations. This record screen is linked to the Civil Penalty screen and to any other screen where information about a private individual is needed, such as Consignee Person on the Cargo screen.

Company Screen

Record applicable information about airlines, shippers, carriers, and brokers the work location commonly provides service to. For example, the reference list of companies becomes the lookup for the data fields on the Broker tab of the Cargo screen.

Record Screens for Setup Data

Setting up a work location in PIN-Ops is a one-time activity that must be performed first to organize how that work location will create, query, and report data using PIN-Ops on a daily basis. Following are the set up screens created for setting up a work location. Each record screen is further described with instructions for set up under Chapter 4.

Work Unit Screen

Set up and record information about the main work unit along with its sub work units and inspection points. Linked to this record screen is the Address screen.

Employees Screen

Set up and record information about all employees who will use PIN-Ops. Each employee's category of access and work location is recorded. The category of access provides each user with their applicable authority to enter and edit records for cargo and conveyances being imported and exported at their main work unit and its sub work units and inspection points.

Carriers Screen

Create a list of carriers that are unique to a main work unit and its sub work units and inspection points. This list then becomes a list of values that users can select from for the data field Com Carrier on the Cargo screen and Conveyance screen. Some arrival schedule data, e.g. carrier type, recorded on this screen automatically fills on the Cargo and Conveyance screens. This screen allows for a customized list for use only by the main work unit and its sub work units and inspection points.

Cargo Locations Screen

Create reference data about cargo inspection locations that are unique to the main work unit and its sub work units and inspection points.

User Defined Screen

Create reference data about user-defined information that are unique to the main work unit and its sub work units and inspection points.

Change Password Screen

Where all users periodically change their passwords for security purposes.